## Research Memorandum 77-8



# EXPERT INFANTRY SQUAD AND PLATOON EVALUATION (EISPE) II CONCEPT: REPORT OF EXERCISE OBSERVATIONS

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ARI FIELD UNIT - USAREUR

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II CONCEPT: REPORT OF EXERCISE OBSERVATIONS,

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## THE EXPERT INFANTRYMAN SQUAD AND PLATOON EVALUATION (EISPE) II CONCEPT: REPORT OF EXERCISE OBSERVATIONS

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## THE EXPERT INFANTRYMAN SQUAD AND PLATOON EVALUATION (EISPE) II CONCEPT: REPORT OF EXERCISE OBSERVATIONS

#### BACKGROUND

The Expert Infantryman Squad and Platoon Evaluation (EISPE) concept was developed by the USAREUR 8th Infantry Division to build a tactically based, performance-oriented Expert Infantryman Badge test (EIB) within the context of a squad and platoon Army Training Test (ATT).

The exercise discussed in this report was the second in a series conducted to test the feasibility of the EISPE concept. An earlier version of EISPE involving individual, squad and platoon events, was tested during January 1975 by a battalion selected from the 8th Infantry Division.\* During that exercise, however, neither individual (EIB) nor squad events were conducted within the context of a larger unit operations; i.e., individual, squad, and platoon tests were conducted independent of one another.

ARI Field Unit USAREUR scientists and others observing the January EISPE concluded that it was feasible to incorporate all three levels of testing within the context of a 5-7 day platoon operation, thus fulfilling the original objective of EISPE.\*\*

In response to recommendations from observers concerning the initial version of EISPE, the 8th Infantry Division G3 staff developed a second EISPE scenario incorporating all individual (EIB) and squad tests into a 7-day platoon operation. In summary the revised EISPE represents a revolutionary step in terms of small unit training/testing.

#### OBSERVATIONS AND CONCLUSIONS

A mechanized infantry battalion of the 8th Infantry Division (not the battalion observed in the January 1975 first administration of EISPE) implemented the revised Expert Infantryman Squad and Platoon Evaluation (EISPE) scenario at the Baumholder, Federal Republic of Germany, major training area during 2-10 July 1975.

The purpose of this field exercise was to investigate the feasibility of the EISPE concept, i.e., the incorporation of all Expert Infantryman Badge (EIB) and squad testing within the context of a 7-day platoon maneuver.

<sup>\*</sup>Strasel, H., Ryan, T., and Word, L. The EISPE Concept: Evaluation and Recommendations. ARI Field Unit USAREUR, February 1975.

<sup>\*\*</sup>At the time this project took place, Dr. Douglas S. Holmes was Chief of the ARI Field Unit in USAREUR.

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Three rifle platoons served as test units, and completed all EISPE events independently, starting the exercise on three successive days. At the request of 8th Infantry Division Commander, at least one member of the Army Research Institute Field Unit-USAREUR participated in each phase of the EISPE exercise as an observer to provide an independent assessment of the EISPE concept.

The ARI evaluation concentrated on four major aspects of EISPE: management of the exercise scenario by the controller/evaluator staff, tested platoon receptiveness to EISPE, the evaluation process, and the value of EISPE as a learning experience for troops, evaluators, and controllers.

Data related to these four areas were gathered by the ARI Field Unit USAREUR staff through meetings with control and evaluator personnel prior to and during the exercise, observations of and interviews with tested platoon members during each EISPE event, and administration of an opinion questionnaire to all tested platoon and evaluator personnel immediately following the exercise.

Analysis of these data indicated that several procedural problems need to be resolved prior to implementation of a final EISPE training/test package on a USAREUR- or Army-wide basis. Several of these problems are discussed in the next section of this report.

Nevertheless, the EISPE concept offers several advantages over the conventional EIB test, and over squad and platoon ATTs. First, incorporation of EIB and squad tests within the context of an extended platoon exercise can be managed without compromising the evaluation process at any of the three echelons.

Second, EISPE enhances the realism and performance orientation of EIB and squad testing since both are accomplished, not in isolation, but within the context of a larger unit operation. Consequently, performance skills are assessed under conditions more like those the individual and squad might experience in combat.

Third, EISPE involves everyone in the platoon. No one is along "just for the ride." Finally, EISPE is efficient. It provides the unit with three echelons of training/testing simultaneously.

#### GENERAL EXERCISE OBSERVATIONS

Some general observations made by the ARI-USAREUR staff during EISPE are summarized below. All should be viewed as areas needing procedural refinements before development of EISPE into a formal training/testing package. They in no way diminish the validity of the EISPE concept.

#### Management of the EISPE Scenario.

Proper management of the EISPE scenario is critical to its validity and utility as a military training/testing operation.

Involved is the necessity for clearly defined roles and responsibilities for each member of the control team; effective communication among aggressor, controller, and evaluator personnel; and procedures for accomplishing training within the context of the exercise. During EISPE, test situations often occur at three echelons of operation simultaneously.

During the exercise described in this report, company commander and exercise TOC staff roles were ill-defined, a condition which might have led to problems in executing the scenario if more than three rifle platoons (e.g., an entire battalion) had been tested simultaneously. Additionally, advantage was not taken of time available for needed training (repetition of events).

Company Commander Role. The role of the company commander whose rifle platoons were tested during EISPE was never clearly defined.

To maximize the chances for a successful EISPE, the commander attempted to assume tactical roles beyond those which he might be expected to pursue during a combat operation, e.g., issuing orders to and briefing squad leaders, and critiquing performance of individuals and units during the exercise in more detail than that provided by evaluator personnel.

Eventually the company commander was overwhelmed by events: (1) he could not be in two or three places at one time, and (2) he could not devote equal time to all individuals and units, discussing their performance on specific events.

This over-involvement with the tested units also precluded the company commander from coordinating with the EISPE controller/evaluator personnel, and required changes in the EISPE scenario and aggressor play, e.g., ambush sites, minefield locations, which occurred just prior to and during the exercise.

EISPE TOC Staff Roles. An EISPE Tactical Operations Center (TOC) was established and manned by personnel of the tested battalion throughout the exercise. Here the progress of the three test platoons was monitored. Visits to the TOC by ARI observers on several occasions suggested that the facility was being underutilized.

Such a facility, if established during future EISPE exercises, could serve as a communications center for controller, aggressor and evaluator teams. Information concerning changes in the scenario, aggressor activities, and evaluator information could be documented and disseminated to interested parties on a timely basis.

EISPE as a Training Vehicle. EISPE is intended to be a training vehicle as well as a test of squad and platoon combat readiness. To accomplish this training objective, the 8th Infantry Division Commander suggested requiring tested units to repeat those portions of the exercise not performed satisfactorily the first time through. Observation of the tested platoons during EISPE, and interviews with participant and evaluator personnel indicated that frequently squad and platoon failure to execute an event satisfactorily did not result in repetition of the event for training purposes, despite ample time being allocated during the 7-day exercise to facilitate such training. If units participating in EISPE are to benefit maximally from this experience, criteria would include a squad or platoon automatically being required to repeat an event for its training value, if they failed to execute that event successfully.

Evaluator/Participant Communication. During EISPE, with tri-echelon activities occurring, it is critical that the participants always be made aware of the type of test on which they are being scored.

For example, entire squads went through the Hand Grenade Assault Course together as a unit. Both the squad and its individual members were evaluated, the latter as EIB subjects. In some instances, the squad was not told that the course was also serving as an EIB subject area.

Consequently, individuals frequently did not expend their allotment of hand grenades during the course even though throwing accuracy was a criterion for success. This type of oversight can be averted by equipping evaluators with a standard briefing outline for each major event of the exercise.

#### Platoon Member Receptivity to EISPE.

A primary objective of EISPE is to provide the platoon member with a sense of tactical realism, a sense of involvement, and a sense of being adequately tested.

ARI observers reviewed the progress of events and conducted interviews with platoon members throughout the exercise. An opinion questionnaire was also administered to all platoon members at the conclusion of the exercise.

Appendix A contains the Platoon Member Opinion Questionnaire and tabluations of responses, broken out by item, for El-E4 and E5-Ol groups of respondents. Observation, interview and questionnaire data provided valuable information concerning troop reaction to EISPE.

Tactical Realism. Observation and interview data indicated that platoon members at all levels experienced a genuine sense of tactical realism, e.g., challenge, fatigue, stress.

The majority of those interviewed felt that being tasked with individual (EIB), squad, and platoon missions continuously without really knowing what would occur next, or in what context, was consistent with what they expected during actual combat.

Additionally, 24 of 68 platoon members completing the opinion questionnaire commented favorably on various aspects of the tactical play (Item 17, EISPE Platoon Member Questionnaire - Remarks).

Reports of dissatisfaction with the level of tactical realism during EISPE revolved around the squad recon patrols, administrative deployment, and the platoon exploitation.

Most shortcomings were imposed by Baumholder training area restrictions. Squad leaders, however, did express legitimate dissatisfaction with the length and restrictiveness of the squad reaction course.

Finally, interview and questionnaire data (Items 15, 16 and 17 - Remarks) indicated dissatisfaction with the level of aggressor play and basis for casualty assessment imposed, especially during the "Delay" and "Daylight Attack" portions of the exercise.

Sense of Involvement. Platoon members reported that they felt they were an integral part of the exercise due to the incorporation of individual (EIB) and squad events into the exercise. Consequently, most platoon members were motivated to find out what was going on at all times, as one soldier commented, "to stay on your toes."

Adequacy of the Test. Platoon members interviewed felt that EISPE was an improved test of their skills as individual soldiers and as members of squad- and platoon-sized units. The major reason given for this feeling was that EISPE tests were conducted in a tactical setting and within the context of a larger unit operation.

The above interview data were further substantiated by opinion questionnaire responses. Both E1-E4 and E5-O1 groups rated EISPE as very relevant to their role as infantrymen (Items 8 and 9), and a fair test of their individual and unit skills (Items 12, 13 and 14).

Of those individuals who had previously competed for the EIB, 72% considered EISPE to be as hard or harder than the more common station concept test of their individual skills (Questionnaire Item 3).

Both groups were less enthusiastic about the individual, squad and platoon training they had received prior to the exercise (Items 10 and 11). Fourteen of the 68 respondents indicated in the Remarks section of the questionnaire that too much of their training was restricted to the classroom, and too little time was spent practicing mounted operations.

#### **Evaluation Process.**

In EISPE as in any other formal evaluation, it is imperative that a comprehensive evaluation schema be applied in a standardized way to each individual and unit event. This concern led ARI Field Unit USAREUR personnel to conduct a seminar with evaluators prior to EISPE during which scoring standards were discussed in detail.

Interviews with evaluators were also conducted throughout EISPE, and an opinion questionnaire was administered to each evaluator at the conclusion of the exercise. Appendix B contains the EISPE Evaluator Questionnaire and tabulation of responses. Interview and observational data led to the following conclusions concerning individual and unit evaluation during EISPE.

Standards for assessing individual (EIB) performance were straightforward, having been taken directly from AR 672-12.\* Platoon and squad evaluators, however, were concerned that a consistent application of unit scoring standards was not being achieved. Evaluators were also unsure of what overall criterion was to be used to assess a pass or fail on each of the squad and platoon events.

Finally, evaluators and platoon members alike were confused and disturbed by the overall platoon evaluation process as they understood it. Most believed that substandard performance by a few on EIB and/or squad tests would result in the entire platoon being declared not combat-ready.

<sup>\*</sup>AR 672-12, Decorations, Awards, and Honors, Expert Infantryman Badge Test, Effective January 1974.

Interpretation and Application of Unit Scoring Standards. A comprehensive set of squad and platoon checklists was appended to the 8th Infantry Division Letter of Instruction.\* Each checklist listed pertinent tasks to be observed, conditions under which task performance should be evaluated, and standards against which task performance should be measured.

Prior to the conduct of EISPE, evaluators reviewed these checklists thoroughly and discussed each standard during a day-long seminar with ARI Field Unit USAREUR personnel. During EISPE, however, evaluators did not utilize the aforementioned checklists but carried only reminder cards, which briefly stated the major scoring criteria for each squad and platoon event. It was assumed that the evaluators had committed each checklist to memory and needed nothing more than the reminder cards to perform a comprehensive evaluation of each event.

This method appeared successful during EISPE practice sessions, but proved inadequate during the actual pacing of EISPE. Possibly the heat, fatigue, and stress of the 7-day exercise caused evaluators to forget to score various phenomena of interest not contained in their reminder cards.

Therefore, ARI recommended that a comprehensive set of scoring checklists be carried and used by evaluators during future EISPE exercises to insure a standard assessment of performance.

Pass/Fail Criteria. Pass/fail and combat-ready criteria were not provided for use during the July 1975 implementation of EISPE. To insure that squads and platoons participating in future EISPE exercises receive a comprehensive evaluation, ARI recommended that four process steps (refinements of EISPE) be undertaken prior to commencement of the exercise:

- (1) That a comprehensive set of performance standards, capable of a common interpretation and required for use by all evaluators, be established by event.
- (2) That a prudent strategy be developed for combining scores across each set of performance standards into a pass or fail grade for each exercise event, and for consolidation of pass/fail grades on platoon events into an assessment of combat readiness.

<sup>\*</sup>Letter of Instruction, Conduct of the Expert Infantryman, Squad and Platoon Evaluation (EISPE), AETHGE-T Bad Kreuznach, Federal Republic of Germany: 8th Infantry Division, G-3 Training, 4 April 1975.

- (3) That individual grades on EIB events, and squad grades on squad tests, not be combined to assess platoon combat readiness without legitimate basis.
- (4) That tested platoons be made aware prior to the exercise of the process, standards, and grading system that will be used to judge their performance.

<u>Casualty Assessment</u>. One of the principal and most controversial duties of an evaluator is to assess casualties when his squad or platoon is maneuvering against a live aggressor force.

Due to the inability of the evaluator to be at several locations within the area of operations simultaneously, it becomes necessary for him to assess personnel losses on an arbitrary basis.

Recognizing this dilemma, the Army is developing a variety of casualty assessment techniques to objectify the evaluation process and lend to it a high degree of face validity. Techniques currently in the USAREUR inventory are SCOPES\* and REALTRAIN:\*\* the former designed for hand held weapons; the latter designed for vehicle-mounted weapons.

During EISPE, SCOPES was employed in the Hand Grenade Assault Course which served as both a squad and individual (EIB) test. Use of the technique among the aggressor force (trained in its use), to inflict tested squad/individual casualties proved to be a very effective tool.

In at least one instance, it short-circuited a dispute between a squad leader and an evaluator over tactics. The squad had successfully negotiated the course and captured its objective without losing a man. Conclusively, the tactics employed by the squad leader were effective.

Use of SCOPES among tested unit personnel had a less desirable outcome. Few of the troops used their M-16 mounted scopes because a majority never before exposed to the technique, was issued the equipment immediately before entering the course, and thus had no opportunity to practice sighting the scope. About two hours of practice are required to become acclimated to the device.

The EISPE experience convinced ARI that use of SCOPES and REALTRAIN would improve the evaluation process during several exercise events, e.g., Grenade Assault Course; Squad Recon Patrols; Platoon Delay, Attack, and Exploitation. However, if used, participants must be given appropriate training in the use of the technique prior to the exercise.

<sup>\*</sup> Training Circular 7-2, Squad Combat Operations Exercise (Simulated) --- SCOPES. Fort Benning, GA.: U. S. Army Infantry School, 1973.

<sup>\*\*</sup>Training Circular 71-5, Tactical Training for Combat Arms Elements--REALTRAIN Fort Knox, KY.: U. S. Army Armor School, January 1975.

Summary of Evaluator Questionnaire Data. Questionnaire data solicited from the 12-member evaluator team are tabulated in Appendix B. Those data suggest the following:

- (1) EISPE was an outstanding individual and unit training experience from the point of view of the participants (Items 4 and 5);
- (2) EISPE was considered a worthwhile learning experience by the evaluators (Item 6);
  - (3) EISPE is a "fair" test of the infantryman (Item 7); and
- (4) the EISPE setting enhances the value of the EIB test and the squad and platoon tests (Items 10 and 11).

Evaluator questionnaire comments (Item 12, Remarks) suggest that evaluators need more training; participants need more training as units, especially in mounted operations, to contend with the demands of EISPE; and greater use of aggressors should be made in the evaluation process.

#### EISPE as a Learning Experience.

A final measure of EISPE is the diagnostic, training, and performance feedback it provides to participating individuals and units. Two elements are involved:

- (1) participant awareness of individual, squad and platoon states of readiness gained by simply going through the exercise itself; and
- (2) guidance concerning performance provided to participants during and after the exercise, that leads to meaningful garrison and local area training.

Interviews with participants during the exercise suggested to ARI Field Unit USAREUR scientists that the EISPE scenario was demonstrating to each participant obvious strong and weak points in his tactical proficiency. Interview data were supported by post-EISPE questionnaire data collected from participants and evaluators. Both groups considered the exercise itself a significant training experience (Platoon Member and Evaluator Questionnaire items 4, 5, and 6).

Nonetheless, if EISPE is to reach its full potential as a training aid, as well as a performance assessment device, a standard set of procedures must be developed for providing performance feedback to individuals and units during the exercise, and for critiquing platoon, squad, and fire team leaders at the conclusion of the exercise.

Performance feedback may include repetition of an exercise event. Feedback provided during the exercise should stress strong and weak points of performance on which the individual and/or unit will have a chance to work during subsequent EISPE events. Overall pass-or-fail scores should not be divulged during the exercise since awareness of a pass or fail affects morale and motivation to perform on later events. Performance feedback provided to individuals and units during EISPE ranged from very comprehensive to non-existent.

#### RECOMMENDATIONS

- 1. That EISPE be adopted as a viable approach to infantry small unit training and testing.
- 2. That more specific procedures and guidelines be established for future EISPE exercises as follows:
  - a. Management of battalion resources for conduct of EISPE.
- b. Preparation of controllers and evaluators for their roles and their conduct of the exercise.
- c. Aggressor, controller, evaluator communications network and reporting requirements.
  - d. Preparation of the EISPE area of operation.
- e. Evaluation standards for all EISPE events, their interpretation, application, and combination to achieve pass/fail judgments.
- f. Use of aggressors and other aids, e.g., SCOPES, to supplement the evaluation process.
- g. Conditions under which individual, squad, and platoon events should be repeated or halted while in process, for training purposes.
- h. Briefing and preparation of tested platoon for participation in EISPE.
- i. Standards for providing performance feedback to tested individuals and units at the conclusion of each EISPE event.
- j. Standards for critiquing tested units upon completion of EISPE to insure that pass/fail scores and reasons for them are known, lessons to be learned from the EISPE experience are communicated, and guidance for future training is provided.

#### REFERENCES

AR 672-12, Decorations, Awards, and Honors, Expert Infantryman Badge Test.

Letter of Instruction, Conduct of the Expert Infantryman, Squad and Platoon Evaluation (EISPE), AETHGC-T Bad Kreuznach, Federal Republic of Germany: 8th Infantry Division, G-3 Training, 4 April 1975.

Strasel, H., Ryan, T. and Word, L., The EISPE Concept: Evaluation and Recommendations. ARI Field Unit USAREUR, February 1975.

Training Circular 7-2, Squad Combat Operations Exercise (Simulated)--- SCOPES. Fort Benning, GA: U. S. Army Infantry School, 1973.

Training Circular 71-5, Tactical Training for Combat Arms Elements--- REALTRAIN. Fort Knox, KY.: U. S. Army Armor School, January 1975.

#### APPENDIX A

#### PLATOON MEMBER QUESTIONNAIRE AND DATA

Platoon members participating in EISPE were administered a short opinion questionnaire, by platoon, during the afternoon of Exercise Day (7). Questionnaires were administered after all individual and unit events had been completed, but prior to platoon members receiving pass/fail feedback concerning their performance.

The questionnaire and the response tabulations, broken out by item for E1-E4 and E5-01 groups of respondents comprise this appendix.

A total of 68 platoon members, excluding medics, were administered the questionnaire: 39 E1-E4 and 29 E5-O1. Data were examined in these two groupings since past experience suggested that persons in leadership roles, e.g., squad or platoon leader, tended to view a field maneuver differently than does the basic infantryman.

In this case, however, patterns of responses were very similar among both groups, with the exception of replies on degree of enjoyment of EISPE (Item 7). The E5-O1 group tended to respond somewhat more favorably and were more homogeneous in their responses on individual items.



#### ARMY RESEARCH INSTITUTE

#### EISPE Platoon Member Questionnaire

These questions are being asked to obtain your opinions of the EISPE exercise. Your feelings will be useful to us in evaluating the effectiveness and worth of the overall EISPE Concept. Your answers will be kept strictly confidential. No individual responses will be reviewed by anyone except the Army Research Institute Staff. We will summarize your responses and report them to Commanders responsible for EISPE.

1.	What was your role in EISPE? (circle one)	Platoon Leader Platoon Sergeant Squad Leader Fire Team Leader Infantryman
2.	Which of the following do you hold? (Circle as appropriate, and indicate number of times awarded.)	CIB Neither
3.	If you have competed for the EIB before, how does this test compare with previous ones? (circle one)	Harder About the same Easier

4. Compared with other field exercises you have been on, how did EISPE stack up as a <u>personal</u> training experience? (circle one)

Much Worse About Better Much Worse the same Better

5. Compared with other field exercises you have been onhow did EISPE stack up as a squad training experience? (circle one)

Much Worse About Better Much Worse the same Better

6. Compared with other field exercises you have been onhow did EISPE stack up as a <u>platoon</u> training experience? (circle one)

Much Worse About Better Much Worse the same Better

#### EISPE Platoon Member Questionnaire Data

ITEM

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Average Much N 4. Personal training experience: (E1-E4) (E5-01) 7 4.02 4.67 5. Squad training experience: (E1-E4) (E5-01) 4.02 4.59 6. Platoon training experience: (E1-E4) (E5-01) 7 5 3.76 4.39 7. Personally enjoy EISPE: 3.51 4.32 

#### APPENDIX B

### EISPE EVALUATOR QUESTIONNAIRE AND DATA

All EISPE evaluators (three 0-3s, six E-7s, and three E-6s) were administered a short opinion questionnaire at the conclusion of the exercise.

The questionnaire and the response tabulations broken out by item comprise this appendix.



#### ARMY RESEARCH INSTITUTE

#### EISPE Evaluator Questionnaire

priate.)

The following questions are being asked to assist the Sth Infantry Division and the 1st Bn, 87th Inf, in assessing the overall value and effectiveness of the EISPE concept. Your individual answers will be kept strictly confidential. No one other than the Army Research Institute Staff will review the questionnaires. We will summarize your responses and report them to Commanders responsible for implementation and evaluation of the EISPE Concept.

1. What was your role in EISPE? Platoon Evaluator (circle one) Squad Evaluator 2. Which of the following do you hold? EIB (Circle as appropriate, and indicate CIB number of times awarded.) Neither 3. During which of the following field Platoon tests have you scored as an evalua-Squad tor prior to EISPE? (Circle as appro-Individual

None

Circle the numbers below that best reflect your opinion concerning the questions being asked.

	Very Little Extent	Little Extent	Some Extent	Great Extent	Very Great Extent
4. To what extent do you think this exercise was a good training experience for the individuals you evaluated?	1	2	3	4	5
5. To what extent do you think the exercise was a good training experience for the unit you evaluated?		2	3	4	5

## EISPE Evaluator Questionnaire Data

ITEM  1. Role in EISPE:  2. Hold the following:  3. Previous evaluator experience:	EIB CIB  EIB CIB  EVALUATOR  PLT SOD IND  A 12 4 4 5  PLT SOD IND  PLT SOD IND  PLT SOD IND  PLT SOD IND  PLT SOD IND						
		Very Little Extent				Very Great Extent	Average
4. Individual training experience:	12	0	2	3	6	5	4.33
5. Unit training experience:	12	0	0	0	3	9	4.75
6. Evaluator training experience:	12	0	0	3	4	5	4.16
7. EIB fair test of infantryman:	12	1	0	2	7	2	3.75
8. <u>Unit</u> scoring standards:	12	0	0	3	7	2	3,91
9. EIB scoring standards:	12	0	0	5	5	2	3.75
10. EISPE adds to EIB test:	12	1	0	4	3	4	3.75
11. EISPE adds to unit tests:	12	0	0	2	2	8	4.50